

Saudi Arabia Brake Pad Market By Material Type (Semi-Metallic, Ceramic, Others), By Vehicle Type (Passenger Car, Commercial Vehicle, Two-Wheeler), By Demand Category (OEM, Aftermarket), Region, Competition Forecast & Opportunities, 2019-2029F

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Abstracts

Saudi Arabia Brake Pad market was valued at USD 407.80 Million in 2023 and is expected to reach USD 624.32 Million by 2029 with a CAGR of 7.36% during the forecast period. The Saudi Arabia brake pad market is witnessing significant growth, driven by increasing vehicle ownership, expanding infrastructure projects, and a shift toward advanced automotive technologies. The government's Vision 2030 initiative is accelerating economic diversification, boosting demand for commercial vehicles in construction and logistics, and supporting growth in the automotive aftermarket. Rising consumer preference for premium and electric vehicles is fostering the adoption of high-performance brake pads, such as ceramic materials, known for their durability, noise reduction, and compatibility with modern vehicles. These factors, coupled with an expanding automotive service network, are strengthening the market's foundation.

Ceramic brake pads are rapidly gaining traction as electric vehicle adoption increases, driven by their lightweight properties and superior performance. The growing focus on sustainability and emissions reduction has pushed manufacturers to explore eco-friendly and low-metallic alternatives, creating opportunities for innovation. Enhanced road safety awareness and stringent regulations for vehicle maintenance are further shaping consumer preferences for quality brake components. As Saudi Arabia continues to invest in large-scale infrastructure and urbanization projects, the demand for heavy-duty and reliable braking systems for commercial vehicles is rising. Technological advancements, including smart brake pads with integrated sensors for wear monitoring, represent a promising area for market expansion.

Despite the positive outlook, the market faces challenges such as fluctuating raw material costs, which impact the profitability of brake pad manufacturers. Limited awareness about premium brake pads among price-sensitive consumers restricts their adoption in certain segments. The shift toward electric vehicles, while a growth driver, also requires manufacturers to adjust to evolving specifications and standards, necessitating continuous investment in R&D. Counterfeit products in the automotive aftermarket pose a significant challenge, undermining brand trust and compromising safety standards. Addressing these challenges will be crucial for sustained growth in the Saudi Arabia brake pad market.

Market Drivers

Vision 2030 and Infrastructure Development

Saudi Arabia's ambitious Vision 2030 initiative is transforming the country into a diversified economic hub. Mega-projects such as NEOM, the Red Sea Project, and Qiddiya are spurring growth in construction, logistics, and infrastructure development. These projects require an extensive fleet of commercial vehicles like trucks, buses, and heavy machinery, all of which rely on robust brake systems. This trend is directly increasing the demand for brake pads designed to endure heavy-duty operations in challenging environments, positioning the construction and logistics sectors as key growth drivers for the brake pad market. For instance, Saudi Arabia has launched a USD 1 trillion infrastructure initiative to diversify its economy beyond oil. Extensive development is underway, featuring around 20 giga and mega projects, with NEOM as the centerpiece. NEOM, one of the world's largest construction sites, currently employs 140,000 workers, expected to rise to 200,000 by 2025. In February 2024, NEOM began the largest earthworks operation globally for The Line, a 170-kilometer linear city. Trojena, NEOM's mountain tourism hub, is developing a manmade lake and 36 kilometers of artificial ski slopes for the 2029 Asian Winter Games. Other significant projects include the Red Sea Project, Diriyah, Qiddiya, and various initiatives in Riyadh.

Rising Vehicle Ownership

With rising disposable income, increased urbanization, and a growing middle-class population, Saudi Arabia is experiencing a surge in vehicle ownership. This trend is particularly evident in urban centers like Riyadh and Jeddah, where private vehicle usage is preferred over public transport. As more cars are added to the roads, the demand for replacement brake pads is increasing, particularly in the automotive

aftermarket segment. Frequent use of vehicles in congested urban traffic further accelerates brake pad wear, boosting replacement cycles and driving market growth.

Growing Electric Vehicle (EV) Market

The Saudi government's push toward sustainable mobility has placed EVs and hybrid vehicles at the forefront of the automotive market. These vehicles have unique braking requirements, with ceramic brake pads being a popular choice due to their compatibility with regenerative braking systems. Ceramic pads are also valued for their longer lifespan and reduced noise. The EV trend not only encourages innovation in brake pad technology but also expands the market for specialized, high-performance materials, making EV adoption a significant growth driver.

Key Market Challenges

Counterfeit Products in the Aftermarket

The availability of counterfeit brake pads in Saudi Arabia's aftermarket undermines the reputation of genuine manufacturers. These low-quality products compromise vehicle safety and performance, posing significant risks to drivers. Counterfeit goods also lead to lost revenue for legitimate brands and erode consumer trust. Combating this issue requires stricter enforcement of intellectual property laws and consumer education initiatives to differentiate authentic products.

Fluctuating Raw Material Prices

The production of brake pads relies on raw materials such as steel, copper, and ceramics, all of which are subject to price volatility in global markets. Fluctuations in these costs create challenges for manufacturers, who must balance competitive pricing with profitability. Sudden increases in material costs can disrupt supply chains and reduce margins, particularly for smaller players in the market.

Supply Chain Disruptions

Saudi Arabia's brake pad market heavily depends on imports for both finished products and raw materials. Global supply chain disruptions, whether due to geopolitical tensions or logistical challenges, can lead to delays and increased costs. Establishing a robust local manufacturing ecosystem could mitigate these risks and provide greater stability to the market.

Key Market Trends

Technological Advancements in Brake Pads

Technological innovation is revolutionizing the brake pad market. Smart brake pads equipped with embedded sensors can monitor wear levels and notify drivers when replacements are needed. This aligns with Saudi Arabia's broader digital transformation efforts under Vision 2030. Advanced technologies improve safety and enhance convenience, appealing to tech-savvy consumers and setting a new standard for automotive components.

Rising Demand for Heavy-Duty Brake Pads

As environmental awareness grows, consumers and manufacturers prioritize sustainability in tire production. Tire companies are exploring ways to reduce the environmental impact of tire production and disposal, emphasizing using renewable materials, such as bio-based rubbers and eco-friendly manufacturing processes. Additionally, tires that offer better fuel efficiency and lower carbon emissions are becoming more popular, as consumers are increasingly aware of the environmental footprint of their vehicles.

Rise of Local Manufacturing Initiatives

In line with Vision 2030's goal of increasing local content in manufacturing, Saudi Arabia is witnessing efforts to establish domestic brake pad production facilities. This shift reduces dependence on imports, creates local jobs, and supports the development of a robust automotive supply chain. Companies are increasingly exploring partnerships with international manufacturers to bring advanced production technologies to the kingdom. For instance, In October 2024, according to the National Industrial Development and Logistics Program, the industrial sector in Saudi Arabia has experienced a remarkable 60 percent increase in facilities since the inception of the national vision. The total number of industrial establishments in the Kingdom rose from 7,206 in 2016 to 11,549 in 2023, underscoring Saudi Arabia's commitment to economic diversification and its ambition to emerge as a global manufacturing leader. The report indicates that Riyadh currently holds the highest number of facilities, boasting 4,502 factories, followed by the Eastern Province with 2,618 and Makkah with 2,209.

Segmental Insights

Vehicle Type Insights

In Saudi Arabia, the passenger car segment dominated the brake pad market. This is primarily driven by the growing number of private vehicle owners, as passenger cars remain the most common mode of transportation in the country. With an increasing population and urbanization, there has been a consistent rise in the demand for personal vehicles. As a result, the demand for brake pads used in passenger cars has surged, making this segment the largest in the market. Moreover, Saudi Arabia's high levels of road infrastructure development and a strong preference for owning private vehicles contribute to the robust growth of the passenger car segment.

As more consumers opt for advanced models, there is also a rising need for high-performance brake pads to ensure safety and vehicle efficiency. The Saudi market has seen a shift towards cars with more sophisticated braking systems, such as disc brakes, further driving the demand for specialized brake pads. This trend is further fueled by a growing focus on vehicle safety standards and increasing awareness about vehicle maintenance among car owners.

The relatively low cost of passenger car brake pads compared to commercial vehicle pads also makes them a more accessible option for a larger consumer base. While the commercial vehicle and two-wheeler segments also contribute to the overall brake pad market, their growth is slower compared to the dominance of passenger cars. The high initial cost and maintenance needs associated with commercial vehicles limit their numbers, thus restricting the growth of this segment in comparison.

Region Insights

In 2023, the Western region of Saudi Arabia has emerged as the dominant market for brake pads. This region, home to key cities such as Jeddah, Mecca, and Medina, plays a critical role in the automotive sector due to its significant economic activity, urbanization, and infrastructure development. Jeddah, as the second-largest city and a major commercial hub, drives a substantial demand for automotive products, including brake pads. The region's strategic position as a gateway for both domestic and international trade further fuels the automotive market. The large population and the influx of religious tourists to Mecca and Medina contribute to the rising number of vehicles on the road, thereby increasing the need for vehicle maintenance and replacement parts, particularly brake pads.

The Western region's dominance is also attributed to its advanced road networks and transportation systems, which ensure the continuous need for automotive parts and services. With the increasing number of vehicles in the region, regular vehicle maintenance and safety checks become essential, leading to an uptick in the demand for brake pads. Additionally, the region's growing automotive repair and service center networks ensure better accessibility to quality brake pads for consumers. The presence of key logistics and retail centers makes it easier to supply these products throughout the region, further contributing to its growth.

The strong economic presence in the Western region is also supported by a rising middle class with greater disposable income, enabling more consumers to invest in high-quality automotive parts. The demand for passenger cars, commercial vehicles, and even luxury vehicles is rising, which directly impacts the brake pad market. With increasing awareness of vehicle safety and maintenance, car owners are more inclined to choose premium products, including high-performance brake pads, boosting the overall market growth in the region.s.

Key Market Players

Brembo N.V.

Continental Automotive Technologies GmbH

Robert Bosch Middle East FZE

General Motors Company

Tenneco Inc.

Sangsin Brake Co., Ltd

Hitachi Astemo, Ltd.

Asimco

Aisin Asia Middle East & Africa DMCC

Advics Asia Pacific Co., Ltd

Report Scope:

In this report, the Saudi Arabia Brake Pad Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Saudi Arabia Brake Pad Market, By Material Type:

Semi-Metallic

Ceramic

Others

Saudi Arabia Brake Pad Market, By Vehicle Type:

Passenger Car

Commercial Vehicle

Two-Wheeler

Saudi Arabia Brake Pad Market, By Demand Category:

OEM

Aftermarket

Saudi Arabia Brake Pad Market, By Region:

Northern & Central

Western

Eastern

Southern

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Saudi Arabia Brake Pad Market.

Available Customizations:

Saudi Arabia Brake Pad Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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